



Types of Requisitions: TSR-EQUIP

A TSR-EQUIP requisition is used when ordering Telecommunications equipment such as desk phones, radios, etc. After entering and submitting a requisition, it routes for approval. Approved requisitions are then sourced to a Purchase Order and dispatched to the supplier.

Procedure



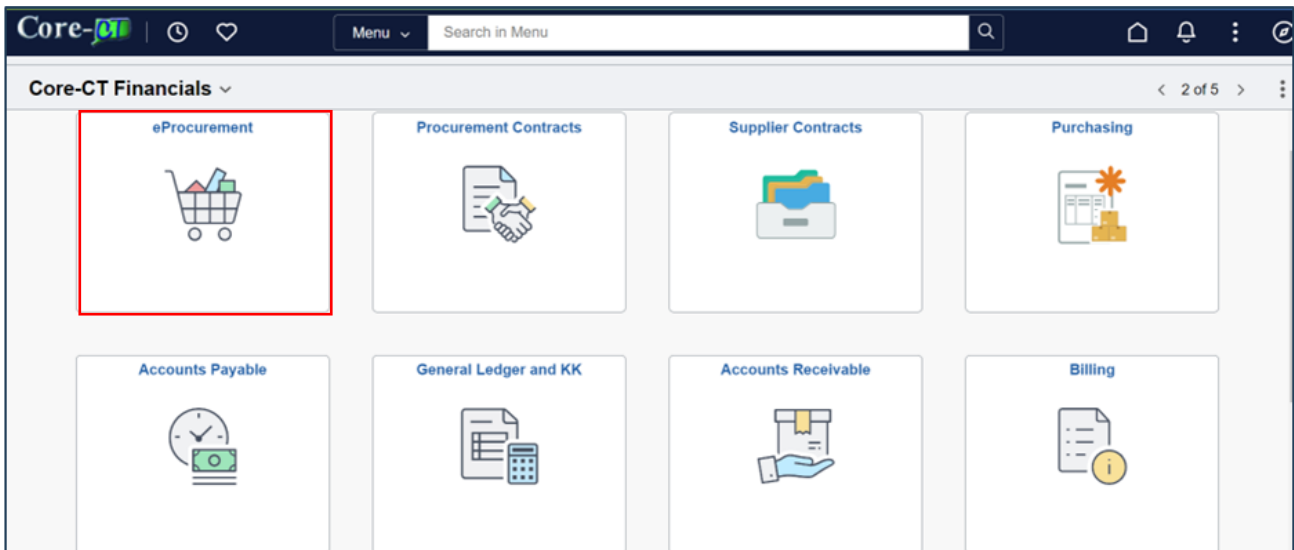
Navigation:

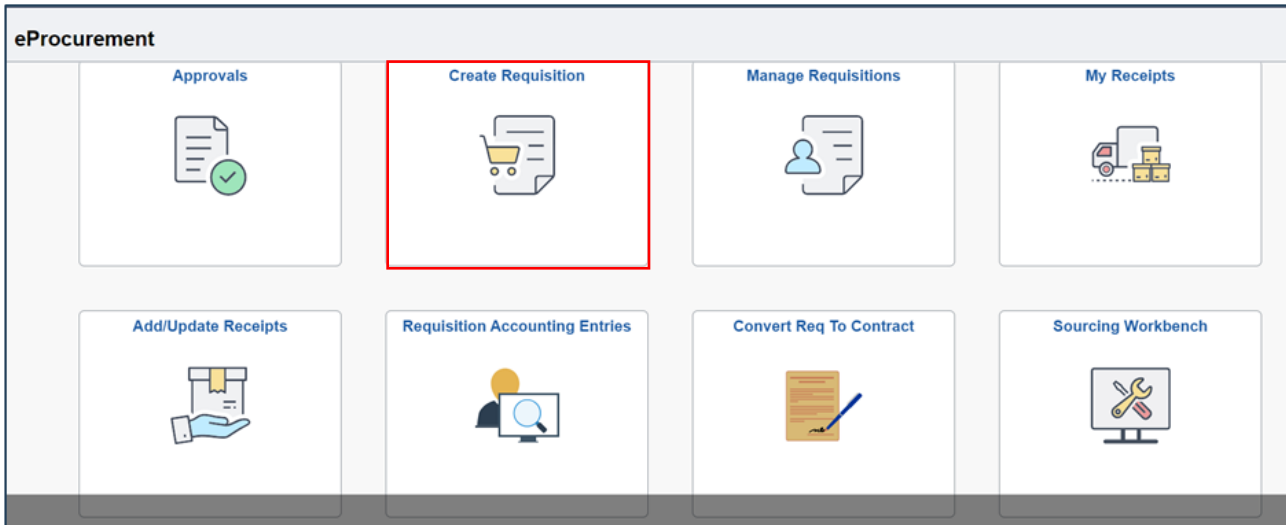
Nav Bar > Menu > Core-CT Financials > eProcurement > Create Requisition

OR

Select Core-CT Financials

Click eProcurement Tile





Requisition Defaults

Cancel Done

Header Defaults

Business Unit: <input type="text" value="MHAM1"/>	Requisition Name: <input type="text"/>
Requester: <input type="text" value="YoungB"/> <small>MHA-Young Barbara</small>	Requisition Type: <input type="text" value="Requisition"/> <small>Obligation Amount</small>
Priority: <input type="text" value="Medium"/>	
Currency: <input type="text" value="USD"/>	

Line Defaults

Supplier ID: <input type="text"/>	Category: <input type="text"/>
Supplier Location: <input type="text"/>	Unit of Measure: <input type="text"/>
Buyer: <input type="text"/>	

Shipping Defaults

Ship To: <input type="text" value="0830000074"/>	Attention: <input type="text"/>
<input type="button" value="Add One Time Address"/>	
Due Date: <input type="text"/>	

1. **Business Unit** Defaults but needs to be correctly selected if user has access to multiple Business Units.
2. Enter **Requisition Name**



Requisition Defaults

Cancel Done

▼ Header Defaults

Business Unit: MHAM1

Requester: []

Priority: Medium

Currency: USD

Requisition Name: []

Requisition Type: [Requisition] (dropdown menu open showing: DAS-BID, ITD-10, POS - Purchase of Service, PSA - Personal Service, Requisition, **TSR-Equipment**, TSR-MACR)

Line Defaults

Supplier ID: []

Supplier Location: []

Buyer: []

Category: []

Unit of Measure: []

Shipping Defaults

Ship To: 083000074

Attention: []

Due Date: []

- 3. Click **Requisition Type** drop down box
- 4. Select **TSR-Equipment**

Requisition Defaults

Currency: USD

Line Defaults

Supplier ID: []

Supplier Location: []

Buyer: []

Category: []

Unit of Measure: []

Shipping Defaults

Ship To: 083000074

Attention: []

Due Date: []

Distribution Defaults

SpeedChart: []

Chartfields1 Chartfields2 Chartfields3 Details Asset Information Show All

Distribution Line 1:	Percent 1:	Location 1:	GL Unit 1:	Account 1:
1	0	ACORE	STATE	[]

- 5. Add **Supplier Id**, **Supplier Location**, **Buyer**, **Category**, and **UOM** to the **Line Defaults**



Distribution Defaults

SpeedChart

Chartfields1 | Chartfields2 | Chartfields3 | Details | Asset Information | Show All

Distribution Line %	Percent %	Location %	GL Unit %	Account %
1	0	ACORE	STATE	

6. Add Chartfield information into the **Distribution Defaults** at the bottom of the page

Requisition Defaults

Cancel Done

Header Defaults

Business Unit: MIHAM1
Requester:
Priority: Medium
Currency: USD
Requisition Name:
Requisition Type: TSR-Equipment
Obligation Amount:
Category:
Unit of Measure:
Supplier ID: 0000000004
Supplier Location: MAIN
Buyer: YoungB
Ship To: 0830000074
Attention:
Due Date:
Add One Time Address

7. Click **Done** at the top of the page

Create Requisition

Requisition Defaults Checkout

Catalog

- Web Suppliers
- Special Requests
- Fixed Cost Service
- Variable Cost Service
- Templates
- Favorites

8. Click **Special Request** link



Note: The Category, Unit of Measure, and Supplier ID fields populate with values entered on the Define Requisitions page.

The screenshot shows the 'Create Requisition' interface. On the left is a navigation menu with options like 'Catalog', 'Web Suppliers', 'Special Requests', 'Fixed Cost Service', 'Variable Cost Service', 'Templates', and 'Favorites'. The main area is titled 'Special Requests' and contains several sections: 'Item Information', 'Supplier Information', and 'Manufacturer Information'. The 'Item Information' section includes fields for '*Item Description', '*Price', '*Quantity', '*Category' (populated with '44000000'), and 'Due Date'. To the right of these are fields for '*Currency Code' (populated with 'USD') and '*Unit of Measure' (populated with 'EA'). The 'Supplier Information' section includes 'Supplier ID' (populated with '0000010008'), 'Supplier Location' (populated with 'MAIN'), and 'Supplier Item ID'. The 'Manufacturer Information' section includes 'Manufacturer ID' and 'Manufacturer's Item ID'. A 'Checkout' button is visible in the top right corner.

9. Enter **Item Description**
10. Enter the **Price**
11. Enter the **Quantity**

This screenshot shows the same 'Create Requisition' interface, but with the 'Comment' section expanded. The 'Item Information' fields are now partially obscured. The 'Comment' section includes a 'Comment Text' field and three checkboxes: 'Send Comment to Supplier', 'Show Comment on Receipt', and 'Show Comment on Voucher'. At the bottom left, an 'Add to cart' button is highlighted with a red box. At the top right, the 'Checkout' button is also highlighted with a red box.

12. Click **Add to Cart**
13. Click **Checkout**

Note: Do this process for all line items you wish to place on your requisition.



Create Requisition

Business Unit: MHAM1 Mental Health & Addiction Serv

Requisition Name:

Requester:

Currency: USD

Priority: Medium

Requisition Type: TSR-Equipment

Dispatch Method: Email

Header Comments:

Justification Comments:

Requisition Lines Overview

Select All Actions

Line	Item	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	Special Request test	5	EA	90.00	USD	450.00 USD	<input type="checkbox"/> ScheduleDetails

Order Total: 450.00 USD

- 13. The **Requisition Save and Submit** page displays
- 14. Click the **Schedule Details** button

Requisition Line Details

Order Total: 450.00 USD

Line 1

Schedule Details | **Line Details**

Item Summary

test

Item ID:

Item Category: Office Equipment and Accessori

Supplier: GRAINGER INDUSTRIAL SUPPLY

Manufacturer:

Supplier Item ID:

Manufacturer's Item ID:

Buyer:

Price: 90.00 USD

Quantity: 5 Each

Attributes

Special Request

Schedule 1

Schedule 1

Quantity: 5

*Ship To: 0830000074

Price: 90.00 USD

Attention To: MHA-Young Barbara

Total: 450.00 USD

- 15. Select the **Line Details** Tab



Requisition Line Details

Order Total 450.00 USD

1 row

Line 1
test

Quantity 5 Each

Attributes

Special Request

Expand All Collapse All

Item Additional Information

Device Tracking No

Stockless Item No

RFQ Required No

Inspection Required No

Amount Only No

Zero Price Indicator No

Contract Information

Use Contract if Available No

Contract ID

Contract Version

Contract Line

Category Line

Supplier Information

16. Click the **Look Up Contract ID** button

Note: *The Purchasing Authority defaults to Contracts*

Lookup

Search for: Contract ID

> Search Criteria

Search Results

6 rows

Contract ID ↑↓	Short Supplier Name ↑↓	Contract Status ↑↓	Description ↑↓	Contract Beginning Date ↑↓	Expire Date ↑↓
24ECDCOREDISCOUNT	GRAING0280-001	Approved	Contract - Discount	03/25/2024	03/25/2025
24ECDCORE124	GRAING0280-001	Approved	Quantity Contract	02/13/2024	02/13/2025
24ECDCORE120	GRAING0280-001	Approved	Create contract PUM	02/13/2024	02/13/2026
24COREQTEST1	GRAING0280-001	Approved	Grainger Test	08/06/2019	06/30/2024
19PSX0104AA	GRAING0280-001	Approved	DPSM1 0000008728	10/01/2018	09/30/2026
17PSX0232AD	GRAING0280-001	Approved	MRO INDUSTRIAL SUPPLIES	08/06/2018	06/30/2024



Note: The Search Results should only display valid Contract IDs for the Supplier selected on the requisition.

18. Select the Valid Contract for the requisition
19. Click **Done**
20. The screen will return to the **Checkout** page

Create Requisition

Business Unit: MHAM1 Mental Health & Addiction Serv
Requisition Name: TEST TSR-MACR
Requester: [Field]
Currency: USD
Priority: Medium
Requisition Type: TSR-MACR
Dispatch Method: Email
Obligation Amount: [Field]

Header Comments

Justification Comments: [Text Area]

Requisition Lines Overview

Select All Actions

Line	Description	Item ID	Quantity	Unit of Measure	Price	Currency	Total	Actions
Line 1	Special Request	test	5	EA	90.00	USD	450.00 USD	ScheduleDetails >

Supplier: GRANGER INDUSTRIAL SUPPLY
 Line Comments Delete

Order Total: 450.00 USD

21. Click on the **Line Comments** tab

Requisition Line Comments and Attachments

Cancel Done

Comments + -

Use Standard Comments

Comment Text [Text Area]

Send to Supplier No

Show at Receipt No

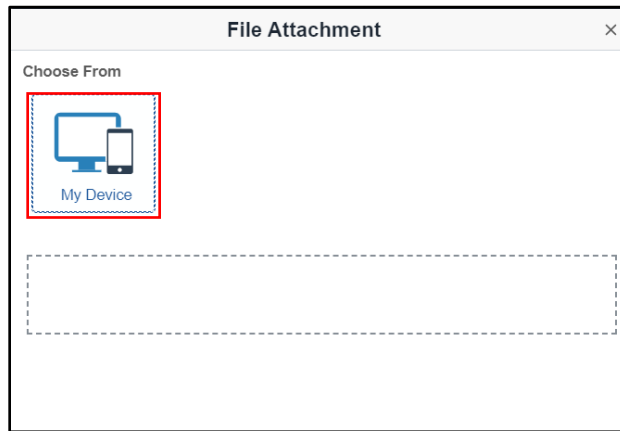
Show at Voucher No

Add Attachment



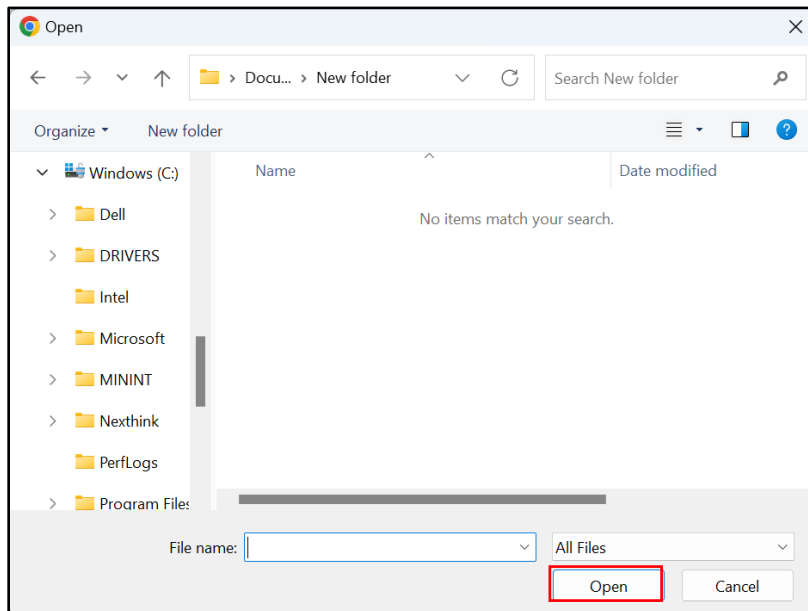
22. Add **Comments**

23. Click the **Add Attachment** button on the **Line Comments** page to attach supporting documents to the requisition

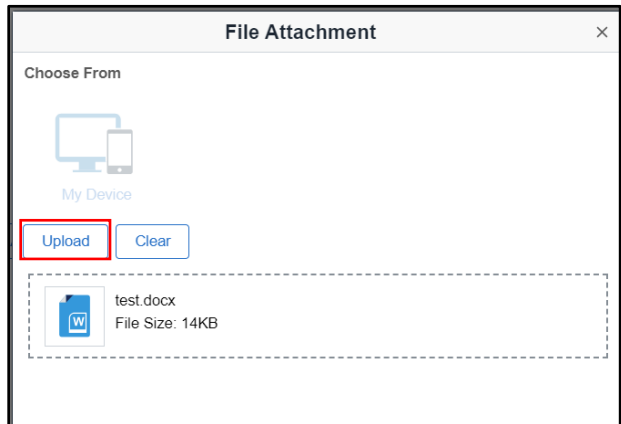


24. Click the **My Device** tab

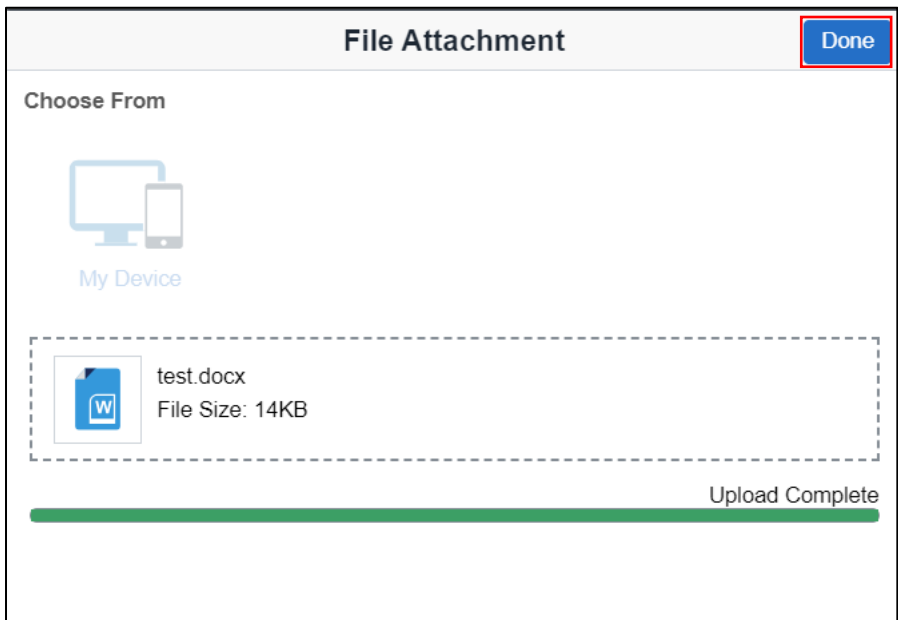
25. Select the document to be attached.



26. Click **Open**



27. Click **Upload**



28. Click **Done**



Cancel Requisition Line Comments and Attachments Done

Comments + -

Use Standard Comments

Comment Text Test

Send to Supplier No

Show at Receipt No

Show at Voucher No

Add Attachment

Attachments 1 row

View	Attachment	Send to Supplier
1 View	test.docx	<input type="checkbox"/> No

29. Click **Done**

Create Requisition

Continue Shopping Save **Submit**

Checkout Requisition Defaults Order Total 450.00 USD

Requisition Summary

Business Unit MIHAM1 Mental Health & Addiction Serv

Requisition Name Test TSR-EQUIP

Requester -

Currency USD

Priority Medium

Requisition Type TSR-Equipment

Dispatch Method Email

Obligation Amount

Justification Comments

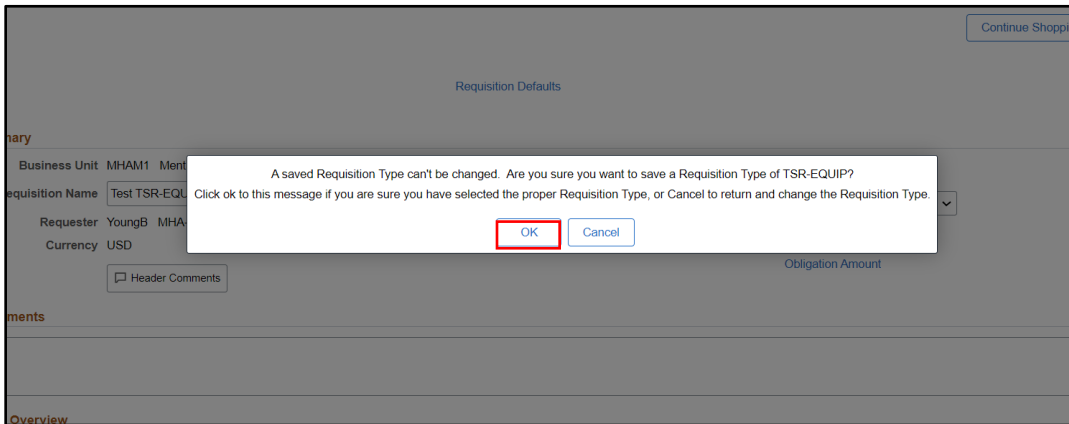
Requisition Lines Overview

Select All Actions

1 row

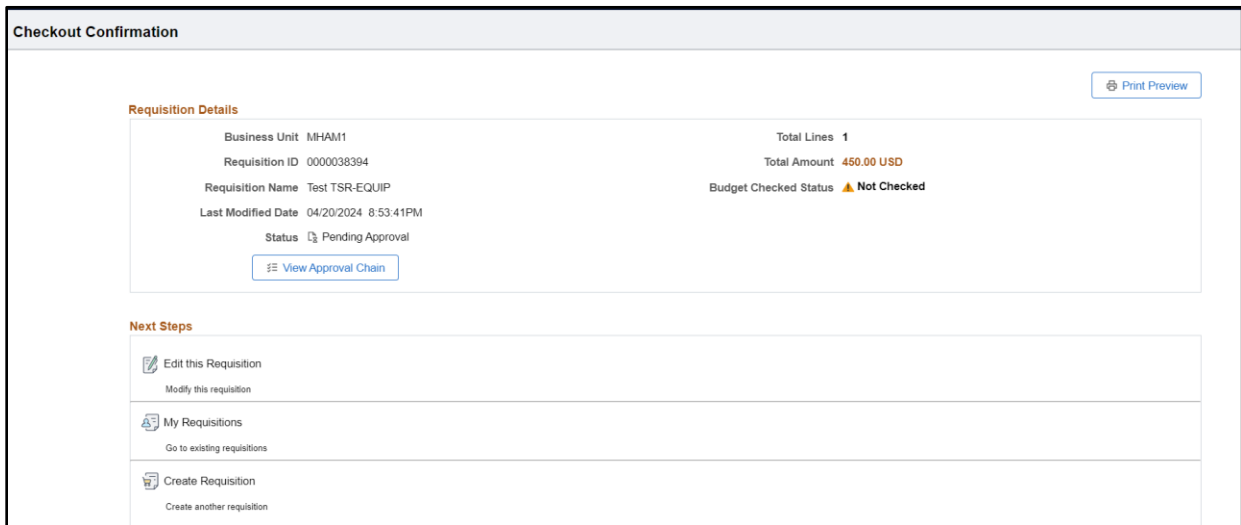
30. Select **Submit** to save this TSR-EQUIP requisition and begin the Approval Workflow process

Note: Selecting **Save** will save the TSR-EQUIP requisition, but not initiate the Approval Workflow process.



31. Click **OK**

The Approval Workflow Confirmation page is displayed. The system assigns a Requisition ID on the confirmation page. The requisition will be routed through the normal ePro TSR requisition approval process.



32. **End of Procedure**